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### **Pre-Bid Conference Summary**

The following is a summary of items discussed at the Pre-Bid Conference held on Wednesday, September 12, 2018.

This summary is intended to be a general record of the meeting and *does not* constitute an amendment to the Invitation for Bids (IFB).

- **Introduction:** The meeting opened at 10:10 a.m. Abdullah Unseri from the Maryland Department of Housing and Community Development (DHCD) presided. Six (6) representatives from six (6) unique vendors attended.
- **Overview:** Mr. Unseri went over key information of the solicitation:

Solicitation Number:	S00R8400018
Title:	Loan Title Services
Issue Date:	August 30, 2018
Due Date:	October 2, 2018 at 2:00 p.m.
Question Deadline:	September 20, 2018 at 12:00 p.m.

- **Small Business Reserve Procurement:** This is a Small Business Reserve Procurement for which award will be limited to certified small business vendors. Only businesses that meet the statutory requirements set forth in State Finance and Procurement Article, §§14-501 —14-505, Annotated Code of Maryland, and that are certified by the Department of General Services Small Business Reserve Program are eligible for award of a contract.
- **Page 4, Mandatory Contractual Terms:** Mr. Unseri called attention to this section of the IFB and stated that the State's mandatory terms and conditions are in the Code of Maryland Regulations (COMAR) and that taking exception to them may result in a proposal being rejected.
  - By submitting a Bid in response to this IFB, a Bidder, if selected for award, shall be deemed to have accepted all terms and conditions of this IFB *and* the State's mandatory terms and conditions under COMAR 21.07.01: [http://www.dsd.state.md.us/COMAR/SubtitleSearch.aspx?search=21.07.01.\\*](http://www.dsd.state.md.us/COMAR/SubtitleSearch.aspx?search=21.07.01.*). Any exceptions to this IFB must be raised prior to Bid submission. Changes to the solicitation, including the Bid Form, made by the Bidder may result in Bid rejection.
- **Page 5, Section 2 - Minimum Qualifications:** Mr. Unseri explained that a factor that can automatically render a bid not reasonably susceptible of being awarded a contract is not providing documentation of minimum qualifications.
  - The following qualifications shall be met to be considered for contract award:

The Bidder to perform the Loan Title Services under this Contract shall have at least three (3) years of experience providing services as described in Section 3 of this IFB. The Bidder has to provide proof of experience by identifying the following information which should cumulatively demonstrate the three (3) years of experience:

- a. Name of client to whom services were provided;
  - b. Name, title, telephone number, and e-mail address, if available, of point of contact for client; and
  - c. Period of service.
- **Pages 6 and 7 Section 3 – Scope of Work - Requirements:** Mr. Unseri introduced Jack Daniels to speak in regards to the Scope of Work.

### **3.1 Property and Judgement Reports**

The Contractor shall provide property and judgment reports for all of the 23 counties located in Maryland and for Baltimore City. The Contractor is to provide these reports within (10) business days of a telephone request from DHCD. The reports shall contain the following information:

#### **A. Report Contents**

1. Owner
  - a. Manner in which the title is held
  - b. Deed volume and page of grantee
  - c. Purchase Price
  - d. Date of Transfer
2. Annual Taxes
  - a. State
  - b. Municipal and County
  - c. Delinquencies
3. Valuation per SDAT/County Assessment
  - a. Land Value
  - b. Improvements
  - c. Frontage and depth of parcel
4. Mortgages / Deeds of Trust
  - a. Date and name of mortgagee(s) / trustee(s)
  - b. Amount of note, interest rate and terms, if shown
  - c. Monthly payment
  - d. Maturity date
  - e. Recording reference volume and page
  - f. Indication if mortgage is an open-end mortgage
5. Liens
  - a. Mechanics, judgment and federal
  - b. Date filed

- c. Recording reference volume and page
- d. Amount of each lien

## **B. Updated Reports**

The Contractor will provide an updated property and judgment report showing recordation of a DHCD loan upon request as above within ten (10) business days of a phone request from the DHCD.

## **C. Reporting**

The Contractor shall submit a monthly report itemizing each property and judgment report provided to DHCD during the previous 30 days. The invoice is to include the name of the DHCD requestor.

1. The Contractor shall provide the Contract Administrator with a quarterly report that identifies the cumulative number of reports provided to DHCD since the start of the Contract.

## **3.2 Recordation Services**

The Contractor shall provide recordation services for all of the 23 counties located in Maryland and for Baltimore City. The requested recordation services to be provided by the Contractor are as follows:

### **A. Recordation and Related Research:**

#### **1. Recordation:**

Record all Deeds of Trust or mortgage instruments and other instruments in the appropriate jurisdiction where the property being financed is located, within two (2) business days of receipt of such documents from the entity designated by DHCD to close the loan. Promptly return the deeds of trust or mortgages and other instruments with evidence of recordation.

#### **2. Title Search:**

Undertake recordation research and retrieval of recorded documents, and conduct title searches and prepare title abstracts as requested by the Department. Such requests will provide the Contractor with all relevant information needed to undertake the research. The Contractor will undertake requested research within three (3) days of receipt of all necessary information.

### **B. Reporting:**

1. The Contractor shall submit a monthly invoice itemizing each instrument recorded (includes bring-to-date of title if Bidder provided property & judgement), each title search, and all title abstracts completed and provided to the Department during the previous 30 days. The invoice is to include the name of the DCD requestor.

2. The Contractor provide to the Contract Administrator a quarterly report that identifies the cumulative number of deeds of trusts or mortgages recorded or researched/retrieved and the number of title searches performed for the Department since the start of the contract

### **3.3 Court Costs**

The Contractor will not be charged recording or copying fees by individual counties for instruments presented for recording by, or on behalf of, the Department of Housing and Community Development. DHCD will provide the Contractor a document regarding this exemption to submit to the clerk of the court. In the event any recording or copying fees are charged by a county, the Contractor shall be reimbursed by DHCD upon submission of receipt or similar documentation of payment to county.

- **Page 8, Section 4 – Bid Format:** Mr. Unseri pointed out that it is important to read and following the instructions as per Section 4 of the IFB.
- **Previous Contract:** DHCD-16-2 – Loan Title Services
  - Award:** A2Z Enterprise Services
  - Term:** 07/26/2016 – 07/25/2018
  - Amount:** \$25,000.00 NTE
- **Anticipated New Contract Start Date:** November 1, 2018.
- **Vendor Questions and Comments:** Questions were asked and addressed and will be posted via a separate document. Questions may be submitted up to 12:00 p.m. on September 20, 2018.
- **Adjournment:** The meeting closed at 10:45 a.m. All vendor attendees signed in.